CONTENTS

	Page
INTRODUCTION	iii
LIST OF TABLES	ix
HIGHLIGHTS	xiii
SECTION ONE - VOLUME OF HOUSEHOLD DIRECT MAIL	1
Ad Mail In The Average Week	1
One Day's Mail	2
1986 vs. 1982 Comparisons	9
SECTION TWO - SOURCES OF DIRECT MAIL	11
Variety Of Advertisers	11
Who Received This Mail?	13
Targeting Of Direct Mail	15
When Did They Receive Direct Mail?	17
SECTION THREE - HOW AD MAIL WAS TREATED	21
How The Mail Was Usually Handled	21
How One Day's Ad Mail Was Handled	26
SECTION FOUR - CIRCULARS AND BUSINESS ADVERTISING MAIL	33
Circulars	33
Ad Mail Sent To Places Of Work	37
SECTION FIVE - ATTITUDES TOWARD ADVERTISING MEDIA	39
Attitudes Toward Mail And Newspaper Advertising	39
Preferred Medium For Department Store Sale Booklets	45
Preferred Medium For Grocery Ads	45
Most Believable Advertising Medium	47
APPENDIX A: TABLES	53
APPENDIX B: ESTIMATING THE DOLLAR VOLUME OF AD MAIL IN 1986	83

LIST OF TABLES

		Page
1.1	Estimated Ad Mail In An Average Week	2
1.2	Composition Of One Day's Mail	3
1.3	Comparative Description Of Amount Of Mail	4
1.4	Yesterday Readership And Receipt Of Ad Mail Among Demographic Groups	6
1.5	One Day's Mail By Half-Month	8
1.6	How Often Ad Mail Received: January 1986 Vs. October 1982	9
2.1	Types Of Ad Mail Received	12
2.2	Advertisers Who Sent Direct Mail By Income Level . .	14
2.3	Targeting Of Direct Mail	16
2.4	Composition Of Ad Mail By Day Of Week	18
2.5	Sources Of Ad Mail By Wave	19
3.1	Where Respondent Is When Mail Arrives	22
3.2	First Handling Of Ad Mail	23
3.3	Kinds Of Ad Mail Put Aside/Thrown Away	24
3.4	What's Done With Advertising Mail Addressed To Others	25
3.5	Disposition Of Ad Mail By Amount Received	27
3.6	One Day's Mail: Items Kept and Thrown Away	28
3.7	What Happened To Ad Mail	29
3.8	Why Ad Mail Piece Was Kept	30
3.9	Why Ad Mail Piece Was Kept By Type Of Retail Advertiser	31

		Page
4.1	Delivery Of Circulars	34
4.2	Newspaper Readership And Supermarket Circulars By Weekly Grocery Expenditure	35
4.3	One Day's Circulars	36
4.4	Ad Mail At Place Of Work	37
4.5	Who Sent Business Advertising Mail	38
5.1	Comparison Of Mail And Newspaper Advertising . . .	40
5.2	Comparison Of Mail And Newspaper Advertising Among Demographic Groups	42
5.3	Summary Of Comparisons Of Mail And Newspaper Advertising Among Demographic Groups	44
5.4	Preferred Medium For Department Store Sale Booklets	46
5.5	Preference For Grocery Ads In Newspapers Or Circulars By Grocery Expenditure	46
5.6	Most Believable Advertising Medium Among Demographic Groups	48
A.1	Respondent Bases	53
A.2	Respondent Profiles	55
A.3	One Day's Mail	57
A.4	Newspaper Readership Among Demographic Groups . . .	59
A.5	Detailed Distribution Of Ad Mail By Category Of Advertiser	61
A.6	What Ad Mail Piece Was About	65
A.7	What Ad Mail Piece Was About (Major Mentions By Category Of Advertiser)	66
A.8	How Ad Mail Was Addressed	67
A.9	Were Contents Delivered In An Envelope?	68
A.10	Contents Of Ad Mail In Envelope	69

		Page
A.11	Format Of Ads Not In Envelope	71
A.12	Ad Mail Items That Came Folded With Other Items . .	72
A.13	Use Of Color By Category Of Advertiser	73
A.14	Types Of Paper Used By Category Of Advertiser . . .	75
A.15	Size Of Ad Mail Pieces In Envelope	77
A.16	Size Of Ad Mail Pieces Not In Envelope	78
A.17	Mean Number Of Pages In Ad Mail Pieces	79
A.18	Characteristics Of Business Direct Mail	80
B.1	Sources Of Ad Mail: 1986 And 1982	86
B.2	Total Production Costs: 1986 And 1982	87
B.3	Distribution Of Consumer Ad Mail Costs By Category Of Advertiser	88

HIGHLIGHTS

1. American adults received 56 billion pieces of third-class mail in 1986. This represents a substantial increase over the 37.5 billion pieces received in 1982, the year of an earlier NAB study of direct mail.

2. American households received an average of 1.6 pieces of advertising mail per delivery day. Upper-income ($35,000+) respondents receive the most direct mail of any income group -- an average of 1.9 pieces of ad mail based on all households, but 2.8 pieces based on households which received any ad mail. Since people in this income group are the newspaper's prime audience, direct mail competes most strongly for the attention of this key segment of newspaper readers.

3. Three-fourths (75%) of all advertising mail in one day's delivery was thrown out. Consumers who receive more direct mail throw out a higher proportion of this mail. In the 1982 NAB study, only 57 percent of the ad mail was thrown away.

4. The largest amount of advertising mail in the month of January was sent by national advertisers, principally by publishers advertising winter reading materials. Local stores and mail order goods together accounted for almost one-half of the direct mail received.

5. Direct mail is targeted disproportionately toward upper-income ($35,000+) households: these households comprised 30 percent of the sample, but received 36 percent of the direct mail. By way of contrast, the lower-income segment (under $15,000) comprised 22 percent of the sample, and received only 18 percent of the ad mail.

6. People who first look over the household mail ("gatekeepers") carefully select what they will read: more than half of the gatekeepers put aside or throw out at least some of the mail the household receives and one-fourth also throw out at least some of the advertising mail sent to other adults in the household. Upper-income ($35,000+) gatekeepers, the ones direct mailers most want to reach, are more likely than other first readers of the mail to throw out ad mail addressed to others.

7. Direct mail from national advertisers, principally publishers, is more likely than mail from other sources to be thrown away. But as consumers are more likely to keep advertising mail from local stores and mass merchandisers, the direct mail challenge is greatest to daily newspapers' retail advertising business.

8. People do not always keep a piece of ad mail in order to buy directly, either by mail or by phone. Many consumers prefer to go to the local store or the mass merchandiser in order to look at the item or to use the coupons.

9. American adults hold much more favorable attitudes toward newspaper advertising than toward mail advertising. By four-to-one margins, they say that "makes it easier to compare prices at different stores" and "helps me to decide where to shop" are attributes more true of newspaper than of mail advertising. Consumers with higher incomes, who receive larger amounts of direct mail, nevertheless hold more favorable attitudes toward newspaper advertising.

10. One-half (48%) of American adults say that newspapers are the most believable advertising medium, substantially more than the proportion selecting television (21%), magazines, or advertising mail (8% each). As is true of attitudes toward newspapers vs. mail advertising, respondents who got more ad mail were more likely than others to select newspapers as the most believable advertising medium.

SECTION ONE. VOLUME OF HOUSEHOLD DIRECT MAIL

The amount of direct mail advertising that Americans receive was measured in two ways. In the first interview, the person who usually is the first to go through the household mail was asked how often and how much ad mail there was in the average week. In the call-back interviews, they were asked about one day's ad mail.

Ad Mail In The Average Week

Almost all adults (98%) received ad mail at least once a week, with two-fifths (42%) of them getting mail advertising almost every day (see Table 1.1). Upper-income ($35,000+) respondents were the most likely (54%) to find these solicitations in their mailboxes almost every day.

During an average week, American adults received an average of 9.3 pieces of mail advertising. Upper-income respondents got the most ad mail (12.2) and lower-income adults (under $15,000) received the least (6.8). Nearly one-third (31%) of upper-income adults had at least 13 pieces of ad mail delivered in an average week, an average of more than 2 per day.

Table 1.1

ESTIMATED AD MAIL IN AN AVERAGE WEEK

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
How Often Ad Mail Received					
Almost every day	42%	34%	34%	42%	54%
Several times a week	39	38	46	42	35
Once a week	16	23	18	15	10
Less often	2	5	2	1	1
How Many Pieces?					
Less than 5	26%	42%	32%	22%	12%
5-8	31	32	36	36	25
9-12	20	13	20	23	32
13+	20	9	12	19	31
MEAN	9.3	6.8	7.4	9.3	12.2

Questions: "Would you say that you get some kind of advertising mail in the household at least once a week? This could be charities, retail stores, coupons, people selling something, etc. (IF YES) Would you say you get mail advertising about once a week, several times a week, or almost every day?"

"Just making a rough guess, about how many pieces of mail advertising do you get in the household mail in an average week?"

One Day's Mail

Eighty-five percent of American adults received some mail on the day of the call-back interview (see Table 1.2). One-half (47%) of all households received both ad mail and personal mail, 28 percent got only personal mail, and 11 percent had only ad mail delivered on that day. The average household in this study received 1.6 pieces of direct ad mail on the day of the call-back interview.

Table 1.2

COMPOSITION OF ONE DAY'S MAIL

Base: Total respondents	Total (1257)	Under $15K (226)	$15K-$24,999 (260)	$25K-$34,999 (248)	$35K+ (308)
Personal and ad mail	47%	37%	39%	49%	61%
Only ad mail	11	14	13	12	7
Only personal mail	28	26	32	26	21
No mail	15	24	15	13	10
Got any ad mail (Net)	57	50	52	61	69
Got any personal mail (Net)	74	63	71	75	82
Half or more was ad mail	35	36	37	38	35
Mean Number Of Pieces Of Ad Mail					
Among total households	1.6	1.3	1.6	1.6	1.9
Among households which received ad mail	2.8	2.5	3.0	2.7	2.8

Questions: "Could you bring all of today's mail to the phone -- even the catalogs and the mail you would have thrown out. How many pieces of mail were delivered, all together?"

"Please tell me how many personal letters you received today. How many bills or statements are there in today's mail? How many regular magazines are there? And how many other pieces of mail from people you do business with?"

"How many pieces of advertising mail are there? I mean things like catalogs, coupons, political, church, or charitable fund raising mail, and advertising in bills or statements."

Households with at least $35,000 incomes were more likely than households with lower incomes to find both personal (82%) and direct ad mail (69%) in that day's delivery. (Table A.3 contains a detailed demographic analysis of one day's mail.)

In the two call-back interviews combined, a plurality of adults (41%) said that they received about the same amount of mail as usual (see Table 1.3). One-fourth (28%) usually got more mail and 16 percent said they usually got less mail on an average day. This finding indicates that during January 1986 people acknowledged getting somewhat less mail than they usually received.

Table 1.3

COMPARATIVE DESCRIPTION OF AMOUNT OF MAIL

Base: Total Respondents	Total (1257)	Under $15K (226)	$15K-$24,999 (260)	$25K-$34,999 (248)	$35K+ (308)
Received Mail	85%	77%	85%	87%	90%
About the same as usual	41	34	42	43	46
Usually get more	28	28	29	28	24
Usually get less	16	15	14	16	20
Received no mail	15	24	15	13	10

Question: "Do you usually get about this much mail every day or was this more-or less than usual?"

Adults in upper-income ($35,000+) households (69%), college graduates (67%), those aged 45-64 (65%), residents of the West (64%), and married adults (62%) were all more likely to have received direct ad mail and to have higher-than-average amounts of direct mail in "today's" delivery (see Table 1.4).

Adults in these demographic categories are also more likely than their counterparts to have read a daily newspaper "yesterday" (see also Appendix Table A.4 for incidences of frequent weekday newspaper readership and of last-four Sunday paper readership). These comparisons underscore the nature of the competitive challenge. Section Five presents data on consumers' attitudes toward these media that consistently favor newspaper advertising in their estimation.

Table 1.4

YESTERDAY READERSHIP AND RECEIPT OF AD MAIL
AMONG DEMOGRAPHIC GROUPS

	Read Daily Yester-day	Received Ad Mail	Mean # of Pieces In All HHs	Mean # of Pieces Received Ad Mail	Half Or More Was Ad Mail
Total	65%	57%	1.6	2.8	35%
By Income					
Under $15,000	55%	50%	1.3	2.5	36%
$15,000-$24,999	55	52	1.6	3.0	37
$25,000-$34,999	61	61	1.6	2.7	38
$35,000+	78	69	1.9	2.8	35
By Age					
18-29	51	48	1.1	2.3	30
30-44	63	59	1.6	2.7	34
45-64	74	65	2.1	3.3	41
65+	73	52	1.5	2.9	35
By Education					
Less than H.S. grad	53	45	1.2	2.7	31
High school graduate	62	53	1.4	2.6	32
1-3 years of college	66	61	1.8	2.9	40
College graduate	74	67	2.0	3.0	38
By Sex					
Male	70	57	1.6	2.8	35
Female	62	57	1.6	2.8	35
By Marital Status					
Married	66	62	1.8	2.9	36
Divorced/widowed/ separated	63	50	1.4	2.8	35
Never married	63	48	1.2	2.4	31
By Number Of Adults					
One	63	52	1.6	3.1	39
Two	65	58	1.6	2.7	34
Three or more	68	60	1.6	2.7	35

(Continued)

Table 1.4

YESTERDAY READERSHIP AND RECEIPT OF AD MAIL
AMONG DEMOGRAPHIC GROUPS
(Continued)

	Read Daily Yester-day	Received Ad Mail	Mean # of Pieces In All HHs	Mean # of Pieces Received Ad Mail	Half Or More Was Ad Mail
Total	65%	57%	1.6	2.8	35%
By Region					
Northeast	60%	56%	1.4	2.6	29%
North central	67	58	1.6	2.8	37
South	63	53	1.4	2.6	33
West	69	64	2.1	3.3	41
By Newspaper Readership					
Yesterday readers	100	60	1.7	2.8	35
Yesterday non-readers	-	52	1.4	2.7	36
Frequent readers	94	61	1.7	2.9	35
Infrequent readers	30	54	1.4	2.6	36
Non-readers	-	42	1.4	3.4	33

Note: "Read Yesterday" percentages are based on the first interview sample in the first half of January. The remaining columns are based on the combined call-back samples for the entire month of January. Bases for demographic groups are shown in Appendix Table A.1 and the respondent profiles are shown in Appendix Table A.2.

A higher proportion of American households received advertising mail in the first half (68%) than in the second half (45%) of January (see Table 1.5). The average number of direct mail pieces per household fell from 2.2 early in January to 0.9 later in the month; the proportion of households whose mail was at least one-half advertising also fell, from 48 percent to 21 percent. (This pattern may or may not apply to other months during the year.)

Table 1.5

ONE DAY'S MAIL BY HALF-MONTH

		January	
	Total	First Half	Second Half
Base: Total Respondents	(1257)	(658)	(599)
Received Mail	85%	88%	82%
Personal Mail	74	73	75
Personal and ad mail	46	53	38
Personal mail only	28	20	37
Ad Mail	57	68	45
Personal and ad mail	46	53	38
Ad mail only	11	15	8
Half or more was ad mail	35	48	21
Number Of Pieces Of Ad Mail			
Among total households	1.6	2.2	0.9
Among households which received ad mail	1.9	2.5	1.1

1986 Vs. 1982 Comparisons

The United States Postal Service (USPS) keeps statistics on the volume of third-class mail, which comprises most of the direct mail sent to households. The amount of third-class mail has increased from 37.5 billion in 1982 to 56 billion in 1986. This increase is reflected in the survey data on the number of pieces of ad mail in an average week (see Table 1.1) and in one day's mail (see Table 1.2).

Adults were more likely to report that they received ad mail "almost every day" in January 1986 (42%) than in October 1982 (30%) (see Table 1.6).* In both years, people with $35,000-plus incomes were much more likely than those with lower incomes to say they got ad mail almost every day.

Table 1.6

HOW OFTEN AD MAIL RECEIVED:
JANUARY 1986 VS. OCTOBER 1982

	January 1986		October 1982	
Base: Total Respondents	Total (867)	$35,000+ (199)	Total (756)	$35,000+ (108)
Almost every day	42%	54%	30%	47%
Several times a week	39	35	39	32
Once a week	16	10	25	19
Less often	2	1	6	3

* See "National Study of Direct Mail: An Inventory of Household Mail and How It Is Treated" (Newspaper Advertising Bureau, 1983).

The amount of advertising mail received by American households in one day's delivery was about the same in January 1986 (1.6) as it was in October 1982 (1.7). This equality is in part due to the decline in the proportion of households which received ad mail, from 67 percent to 57 percent. However, households which received ad mail had more of it delivered to their homes in January 1986 than in October 1982 (2.8 and 2.6 pieces per delivery day, respectively). Since January traditionally has a below-average amount and October has an above-average amount of ad mail, the equivalence in direct mail pieces per household masks the substantial increase in the volume of direct mail between October 1982 and January 1986. (See also Appendix B: Estimating The Dollar Volume Of Direct Mail In 1986.)

SECTION TWO. SOURCES OF DIRECT MAIL

The sources of advertising mail were measured in two ways. In the first interview, respondents were asked about the advertising mail they were sent; in the call-back interviews, they were asked about the kinds of advertisers who sent them ad mail that day.

Variety Of Advertisers

A wide variety of advertisers send out direct mail.* Almost all (94%) of the respondents to the first interview could recall some type of ad mail they receive (see Table 2.1). The most frequently mentioned types of companies which sent them ad mail were department stores (41%), magazine subscriptions (35%), supermarkets (26%), food coupons (19%), and insurance companies (18%).

Upper-income ($35,000+) adults were more likely than their counterparts to receive advertising from department stores (46%), book clubs (24%), charities (22%), and financial organizations -- insurance companies (24%), credit card companies (14%), and banks (9%).

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* See Tables A.5 for a more detailed distribution of advertisers who sent ad mail and Tables A.6-A.17 for physical characteristics of one day's ad mail.

Table 2.1

TYPES OF AD MAIL RECEIVED

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Department Store	41%	39%	34%	46%	46%
Magazines	35	29	35	37	38
Supermarkets	26	32	29	21	27
Coupons for food/ grocery products	19	19	19	17	21
Insurance companies	18	15	19	15	24
Book clubs/companies	17	10	17	18	24
Charities/fund-raising groups	16	16	10	19	22
Mail order companies	15	11	16	17	19
Discount stores	14	11	11	14	18
Credit card companies	10	5	8	11	14
Contests	8	6	10	4	10
Record/tape/cassette clubs	7	4	5	7	9
Building supply stores	6	3	4	6	10
Other stores	6	6	8	6	6
Drug stores	6	7	5	6	6
Banks	6	2	3	8	9
Local merchants	4	3	5	4	6
"Collectibles"	3	3	2	3	4
Automotive	3	4	3	2	6
Fast food restaurants	3	3	4	2	3
Political	2	3	2	3	2
Religious	2	3	1	1	3
Household services	2	2	2	2	2
Toiletries	1	2	2	1	1
Household furnishings	1	1	-	1	2
Real estate	1	1	2	2	2
Education/entertainment	1	1	1	1	1
Other	9	6	9	11	11
None/various/no answer	6	6	4	3	2

Question: "What kinds of companies or organizations send you mail advertising?"

Who Received This Mail?

Two-fifths (38%) of the advertising mail on the day of the call-back interview was sent by national advertisers, principally from publishers (18%) (see Table 2.2). Another one-fourth (25%) came from local advertisers -- stores, services, shoppers, etc. An additional one-fifth (22%) of direct mail was mail order goods, a category which contains both national and local companies. The remaining 14 percent were sent by mass merchandisers, e.g., Sears, J. C. Penney.

Overall, there was little variation in the distribution of direct mail within income categories. Mail sent to upper-income ($35,000+) households contained a higher proportion (42%) of national ad mail than did the mail sent to households in the other income groups. Ad mail sent to lower-income (under $15,000) households contained more mail order goods (28%), and less from publishers (14%). Households with $15,000-$24,999 incomes received a higher proportion (18%) of mail from mass merchandisers; households with $25,000-$34,999 incomes had somewhat more mail from local advertisers than did other income groups.

Table 2.2

ADVERTISERS WHO SENT DIRECT MAIL
BY INCOME LEVEL

Base: Ad Mail Pieces	Total (1880)	Under $15K (278)	$15K-$24,999 (357)	$25K-$34,999 (373)	$35K+ (574)
Nationwide Direct Mail (Net)	38%	33%	38%	37%	42%
Publishers	18	14	21	17	21
Non-profit	5	7	5	5	5
Insurance/financial	5	3	3	5	6
Coupons	5	5	6	4	5
Miscellaneous industries	2	1	1	4	3
All other	2	3	2	1	3
Mail Order Goods (Net)	22%	28%	16%	21%	19%
Multi gifts/gadgets	5	10	4	4	4
Single category catalogs	13	15	9	13	10
Single items/general merchandise	4	3	3	4	5
Local (Net)	25%	27%	27%	30%	25%
Stores (Sub-Net)	10	9	10	12	11
Department stores	2	*	1	3	2
All other stores	8	9	10	9	8
Shoppers	3	4	1	4	2
Services	5	4	5	4	5
Educational/entertainment/ "cultural"	2	3	3	2	2
Political	1	*	1	1	1
Shared mail	3	3	4	5	2
Other	2	3	2	2	2
Mass Merchandisers (Net)	14%	13%	18%	13%	14%
National chains	3	4	2	2	3
Discount chains	4	3	4	3	3
Supermarkets	2	3	4	2	1
Other mass merchandisers	5	4	8	5	6
Combinations					
Total retail stores (local stores + mass merchandisers)	23%	22%	28%	24%	24%
Total retail (total retail stores + mail order goods)	49	45	45	43	43

* Less than 0.5%

Targeting Of Direct Mail

Although households with different incomes received fairly similar mixes of advertising mail, they did not get the same volume. Upper-income ($35,000+) households constituted 30 percent of our call-back sample, but their day's delivery had 36 percent of the advertising mail (see Table 2.3). Lower-income (under $15,000) households, on the other hand, comprised 22 percent of the sample but received only 18 percent of the direct mail.

Upper-income households were targeted by a wide variety of advertisers. National advertisers sent 40 percent of their direct mail to this income segment; insurance and financial marketers (51%), publishers (40%), and coupon mailers (39%) targeted this group most heavily. Local stores (37%), national chains (41%), discount chains (36%) also sent a disproportionate amount of their advertising to upper-income households. By way of contrast, national advertisers sent a disproportionately lower percentage (15%) of their advertising to lower-income (under $15,000) households. Mail order companies (25%) and national chains of mass merchandisers (22%) targeted lower-income households.

Table 2.3

TARGETING OF DIRECT MAIL

Base: Ad Mail Pieces*	(Base) (1582)	Under $15K 18%	$15K-$24,999 23%	$25K-$34,999 24%	$35K+ 36%
Nationwide Direct Mail (Net)	(607)	15%	22%	23%	40%
Publishers	(297)	13	25	22	40
Non-profit	(86)	23	22	23	31
Insurance/financial	(71)	10	14	25	51
Coupons	(79)	16	25	19	39
Miscellaneous industries	(39)	10	10	38	41
All other	(35)	26	20	11	43
Mail Order Goods (Net)	(314)	25	18	24	32
Multi gifts/gadgets	(76)	36	18	17	29
Single category catalogs	(181)	23	18	27	32
Single items/general merchandise	(66)	12	18	24	45
Local (Net)	(422)	18	23	26	33
Stores	(167)	15	22	26	37
Shoppers	(43)	26	12	35	28
Services	(74)	16	26	19	39
Educational/entertainment/ "cultural"	(40)	18	27	23	32
Political	(13)				
Shared mail	(50)	18	26	34	22
Other	(35)	26	20	23	31
Mass Merchandisers (Net)	(225)	16	28	21	35
National chains	(46)	22	17	20	41
Discount chains	(56)	16	29	20	36
Supermarkets	(36)	19	36	25	19
Other mass merchandisers	(87)	11	31	21	37
Combinations					
Total retail stores (local stores + mass merchandisers)	(392)	16%	26%	23%	35%
Total retail (total retail stores + mail order goods	(706)	20	23	24	34

* The base is ad mail pieces from identified types of advertisers sent to respondents who answered the income question.

When Did They Receive Direct Mail?

More direct mail was delivered on Tuesday (422 pieces, 22% of the total) than on any other day of the week (see Table 2.4). Monday and Wednesday each saw the arrival of an additional 17 percent of the ad mail received by our sample.

Advertising from different sources tended to arrive on different days of the week. National advertising (44%) was a higher proportion of Monday's mail than on any other day of the week. Mail order goods, on the other hand, were a more common part of Friday's (29%) and Saturday's (31%) mail. Local advertisers and mass merchandisers timed their deliveries to arrive in mid-week: 36 percent of Wednesday's and 29 percent of Thursday's mail were from local advertisers; 17 percent each of Tuesday's and Wednesday's deliveries were from mass merchandisers.

There was much more advertising mail (from known sources) received during the first half of January than during the second half of January (1389 pieces vs. 491 pieces, respectively) (see Table 2.5). Greater proportions of mail from national advertisers (41% vs. 31%), particularly publishers (20% vs. 13%), were delivered early in January. The latter half of January saw higher proportions of mail from mass merchandisers (18% vs. 13%) and local advertisers (31% vs. 23%), particularly from stores (15% vs. 8%).

Table 2.4

COMPOSITION OF AD MAIL BY DAY OF WEEK

Base: Ad Mail Pieces	Total (1880)	Monday (324)	Tuesday (422)	Wednesday (324)	Thursday (287)	Friday (249)	Saturday (274)
Nationwide Direct Mail (Net)	38%	44%	36%	32%	41%	41%	39%
Publishers	18	22	14	14	16	25	20
Non-profit	5	4	5	6	7	5	4
Insurance/financial	5	5	6	5	5	4	6
Coupons	5	5	7	3	8	4	5
Miscellaneous industries	2	3	2	2	3	2	1
All other	2	4	1	3	2	2	2
Mail Order Goods (Net)	22	20	24	14	15	29	31
Local (Net)	25	24	23	36	29	19	20
Stores (Sub-net)	10	10	8	13	14	7	5
Department stores	2	2	1	2	2	2	1
All other stores	8	7	6	11	12	6	3
Shoppers	3	2	2	6	2	2	2
Services	5	5	5	5	4	5	5
Educational/entertainment/"cultural"	2	3	2	1	3	2	3
Political	1	1	1	1	1	*	*
Shared mail	3	2	4	6	3	1	1
Other	2	2	1	5	1	1	4
Mass Merchandisers (Net)	14	12	17	17	15	10	10
National chains	3	3	2	2	5	3	2
Discount chains	4	2	7	5	2	2	2
Supermarkets	2	1	3	2	4	2	1
Other mass merchandisers	5	5	5	8	4	4	4
Combinations							
Total retail stores (local stores + mass merchandisers)	23%	21%	25%	31%	29%	18%	15%
Total retail (total retail stores + mail order goods	45	41	49	44	44	46	46

* The base is ad mail pieces from identified types of advertisers sent to respondents on different days of the week.

Table 2.5

SOURCES OF AD MAIL BY WAVE

Base: Ad Mail Pieces	Total (1880)	First Half of January (1389)	Second Half of January (491)
Nationwide Direct Mail (Net)	39%	41%	31%
Publishers	18	20	13
Non-profit	5	6	4
Insurance/financial	5	5	5
Coupons	5	6	3
Miscellaneous industries	2	2	1
All other	2	2	2
Mail Order Goods (Net)	22	23	20
Multi gifts/gadgets	5	5	5
Single category catalogs	13	13	11
Single items/general merchandise	4	4	4
Local (Net)	25	23	31
Stores (Sub-net)	10	8	15
Department stores	2	1	3
All other stores	8	6	12
Shoppers	3	2	4
Services	5	5	5
Educational/entertainment/ "cultural"	2	2	3
Political	1	1	1
Shared mail	3	4	1
Other	2	2	3
Mass Merchandisers (Net)	14	13	18
National chains	3	3	4
Discount chains	4	4	3
Supermarkets	2	2	3
Other mass merchandisers	5	4	8
Combinations			
Total retail stores (local stores + mass merchandisers)	23%	20%	32%
Total retail (total retail stores + mail order goods)	45	43	52

Question: "What company, store, or organization sent it to you?"

SECTION THREE. HOW AD MAIL WAS TREATED

How The Mail Was Usually Handled

The respondents in this study were the first persons in their households to look at the mail. Two-thirds (68%) of these respondents were women. The proportions of these "gatekeepers" who were at home when the mail arrived (49%) or who picked it up when they get home from work (47%) varied significantly by income group (see Table 3.1). Women (56%) are more likely than men (36%) to be at home when the mail arrives, as is consistent with their lower rate of participation in the work force.

In the first interview, respondents were also asked about how they usually handled the household mail (see Table 3.2). Two-fifths (38%) said they read through all of it. Others read only some of the mail -- either putting some of it aside (29%) or throwing some out (26%) -- or put all of it aside until later (8%). Adults with household incomes of at least $25,000 are more likely than their lower-income counterparts to read only some of the mail (62% vs. 46%).

Table 3.1

WHERE RESPONDENT IS WHEN MAIL ARRIVES

	Total	Under $15K	$15K-$24,999	$25K-$34,999	$35K+
Base: Total Respondents	(867)	(158)	(167)	(158)	(199)
At home when mail arrives	49%	71%	44%	39%	38%
Pick it up when I get home from work	47	23	53	55	58
Other	4	6	3	6	4
Base: Women	(586)	(127)	(120)	(95)	(118)
At home when mail arrives	56%	71%	48%	47%	46%
Pick it up when I get home from work	40	23	48	46	51
Other	4	6	3	7	3
Base: Men	(280)	(31)*	(47)	(63)	(81)
At home when mail arrives	36%	71%	32%	29%	27%
Pick it up when I get home from work	61	26	66	68	69
Other	3	3	2	3	4

* Caution: Small base size.

Question: "Are you usually at home when the mail arrives, do you pick it up when you get home from work, or what else?"

Table 3.2

FIRST HANDLING OF AD MAIL

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Read through all of it	38%	44%	42%	31%	34%
Read through some, put other things aside	29	26	27	34	30
Read some things, throw other things away	26	21	18	29	32
Put it all aside till later	8	9	13	6	5

Question: "And when you pick up the mail, what is usually the next thing you do -- do you read through all of it right away, do you read some things and put other things aside till later, do you read some things and throw other things away, or do you put it all aside till later?"

Advertisements (66%), bills (28%), magazine subscriptions offers (16%), and contests or sweepstakes (14%) were the most frequently cited as types of mail usually put aside (see Table 3.3). Advertisements (81%) were also the kind of mail that was most frequently cited as thrown out, followed by contests or sweepstakes (25%), magazine subscription offers (19%), and insurance companies' mail (14%). Looking at these proportions in another way, one-fifth (21%) of the total sample state that they usually throw out some of their advertising mail without reading it.

Table 3.3

KINDS OF AD MAIL PUT ASIDE/THROWN OUT

Base: Number Of Respondents	Put Aside (249)	Thrown Out (223)
Advertisements	66%	81%
Bills	28	1
Magazine subscription offers	16	19
Contests/sweepstakes	14	25
Catalogs/brochures	11	12
Coupons	10	7
Insurance companies	6	14
Book club offerings	5	7
Credit card companies	4	5
Mail for others in family	4	2
Banks	4	-
Record/tape/cassette club offerings	2	1
Junk mail	2	1
Sales/store information	2	1
Religious	2	1
Political	2	2
Other	5	3

Questions: (IF "PUT OTHER THINGS ASIDE") "What kinds of mail do you put aside till later?" OR (IF "THROW OTHER THINGS AWAY") "What kinds of mail do you throw away?"

Two-thirds (67%) of the "gatekeepers" would save a piece of direct ad mail addressed to another person in the household without regard to the other's expected interest in that piece of mail (see Table 3.4). However, 17 percent would just throw it out, a figure that is quite close to the 21 percent of the total sample who said they would throw out some of their ad mail. Upper-income ($35,000+) respondents were much more likely (25%) than "gatekeepers" in lower-income households to say they would throw out a piece of ad mail addressed to someone else.

Table 3.4

WHAT'S DONE WITH ADVERTISING MAIL
ADDRESSED TO OTHERS

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Would save it regardless	67%	65%	73%	66%	65%
Would throw it out	17	10	14	17	25
Would do both/depends on ad	7	8	5	7	9
I'm the only adult in the household	7	15	7	8	1
Other	2	2	1	3	1

Question: "I understand that most of the time you are the first person in your household to see the mail. Suppose that the day's mail included a piece of advertising addressed to someone else in your household. Would you save it for that person regardless, or would you throw it out if you were sure it was something the other person didn't want, or what else would you do?"

How One Day's Ad Mail Was Handled

In the call-back interview, respondents were asked to sort that day's ad mail into two groups--the pieces they would keep and the pieces they would have thrown away. They were than asked a series of questions about the advertising mail they wanted to keep and were also asked to send in the remaining items to the research company. The research company then coded the ad mail that the respondents were keeping, how these pieces were handled by the households, and why each piece was being kept.

Respondents threw out three-fourths (75%) of the advertising mail received in "one day's" mail.* Adults in all income groups threw out about the same proportion of the ad mail they received. However, respondents who received more ad mail threw out a higher percentage of it: Adults who got only one piece kept 44 percent of this mail; people with three to five pieces kept only one-fourth of them; and consumers who received six or more pieces saved only 14 percent of their ad mail on that one day (See Table 3.5). By way of contrast, in October 1982 only 57 percent of the ad mail received in that day's delivery was thrown out.

* Respondents received a total of 2016 pieces of advertising mail. In the first half of January, 67 pieces were thrown out but not included in the tabulations of ad mail sent to the research company, and in the second half of January, 69 pieces were thrown out before the call-back interview began. There are no data of any kind on these ad mail pieces.

Table 3.5

DISPOSITION OF AD MAIL
BY AMOUNT RECEIVED

		% Of Ad Mail	
	(Base)*	Kept	Thrown Out
Total Respondents	(718)	25%	75%
Received			
1 piece	(258)	44%	56%
2 pieces	(165)	34	66
3	(113)	25	75
4	(57)	26	74
5	(57)	27	73
6+ pieces	(69)	14	86

* Base=Respondents who received that number of ad mail pieces in one day's mail.

Overall, 27 percent of ad mail items from known sources were kept (see Table 3.6). By category, lower percentages of nationwide (23%) and local ad mail (25%) were kept than of mail order goods (33%) and mass merchandisers (32%). Among the items that were kept more than the average, though accounting for only a small proportion of the total volume, were coupons, department store ads, and ads from national chain stores.

Table 3.6

ONE DAY'S MAIL: PERCENTAGE OF ITEMS KEPT

Base: Ad Mail Pieces From Known Sources	(Base) (1874)	Items Sent 100%	Items Kept 27%
Nationwide Direct Mail (Net)	(727)	38%	23%
Publishers	(343)	18	17
Non-profit	(102)	5	15
Insurance/financial	(96)	5	15
Coupons	(98)	5	49
Miscellaneous industries	(44)	2	34
All other	(44)	2	32
Mail Order Goods (Net)	(409)	22	33
Multi gifts/gadgets	(92)	5	39
Single category catalogs	(242)	13	33
Single items/general merchandise	(75)	4	24
Local (Net)	(476)	25	25
Stores	(178)	10	37
Department stores	(33)*	2	58*
All other stores	(145)	8	32
Shoppers	(51)	3	22
Services	(89)	5	17
Education/entertainment/"cultural"	(43)	2	26
Political	(17)*	1	18*
Shared mail	(55)	3	2
Other local	(43)	2	33
Mass Merchandisers (Net)	(262)	14	32
National chains	(54)	3	48
Discount chains	(69)	4	22
Supermarkets	(43)	2	40
Other mass merchandisers	(96)	5	26
Combinations			
Total retail stores (local stores + mass merchandisers)	(440)	23%	34%
Total retail (total retail stores + mail order goods)	(849)	45	33

* Caution: Small base size.

Questions: (Second interview) "Please sort today's advertising mail into two groups - those pieces of advertising mail you plan to keep and those pieces you planned to throw away."
(Third interview) "Do you plan to keep this piece of advertising mail or do you plan to throw it away?"

One-third (36%) of the ad mail pieces that were saved were read right away, 32 percent were put aside to be read later, 23 percent were scanned quickly and saved for additional consideration, and 11 percent were saved for another person in the household (see Table 3.7).*

Table 3.7

WHAT HAPPENED TO AD MAIL

Base: Ad Mail Pieces Kept	Total (503)
Read through it right away	36%
Put it aside to read later	32
Put it aside for someone else to read/ gave it to someone else	11
Scanned it quickly and then saved	23

Note: Multiple answers possible.

Question: "What happened to this piece of advertising mail? Did you..."

* Note that these data are based on ad mail pieces received in one day's mail. The figures in Table 3.4 (page 25) are based on what respondents said they do in general, rather than their handling of one day's mail.

We have already seen that three-fourths of all advertising mail pieces were thrown out. But why did people keep the pieces they did? Mail advertising was kept principally in order to buy something through the mail (26%), just to look at (23%), to use the coupons (16%) or to go to the store to look at an item (13%) (see Table 3.8).

Thus in three of four cases, mail advertising is not a direct-response medium, kept in order to buy an item at that moment, either by mail or by phone. Newspaper ads compare very favorably for their capacity to perform this and other types of services to consumers, especially to generate store traffic.

Table 3.8

WHY AD MAIL PIECE WAS KEPT

Base: Ad Mail Pieces Kept	Total (503)
To buy/order through mail	26%
Just to look at	23
Use coupons	16
Go to store to look at item	13
Give to other family member	11
Shopping/might want/need product	7
Keep to use for sale	1
Only to pay bill/no interest in advertising	1
No answer	7

Note: Multiple answers possible.

Question: "Why are you keeping this piece of advertising mail?"

The reasons for keeping a piece of advertising mail depended, in part, on the kind of company that sent it. Advertising from retail stores was less likely to be kept to order merchandise through the mail or by phone than was mail from other kinds of advertisers (see Table 3.9). Rather, people used retail mail advertising for the coupons (e.g., 25% of the local retail store items kept) or as a guide for what to look at during their next trip to the store (e.g., 37% of the mass merchandisers' items kept).

Table 3.9

WHY AD MAIL PIECE WAS KEPT
BY TYPE OF RETAIL ADVERTISER

Base: Ad Mail Kept	Total (503)	Total Retail Stores (148)	Local Retail Stores (65)	Mass Merchandisers (83)
To buy/order through mail	26%	14%	9%	17%
To buy/order by phone	1	3	2	4
Go to store to look at item	13	33	28	37
Use coupons	16	18	25	13

SECTION FOUR. CIRCULARS AND BUSINESS ADVERTISING MAIL

Receipt of circulars was also measured in two ways. In the first interview, respondents were asked if they ever received advertising left on their doorstep and from which kinds of stores. In the call-back interview during the first half of January, they were asked about circulars left at their doors on that day.

Circulars

Less than one-half (46%) of American households acknowledged the receipt of circulars (see Table 4.1). The average number of circulars received in an average week was just 1.0.

Upper-income ($35,000+) households were most likely to receive circulars (54%) and to receive the greatest number in an average week (1.3). Lower-income households (under $15,000), on the other hand, were the least likely to get any circulars delivered (38%) and to find the fewest circulars (0.8) sitting on their doorsteps in an average week. These findings are consistent with the often-noticed practice of targeting circulars to the more well-to-do households.

Table 4.1

DELIVERY OF CIRCULARS

Base: Total Respondents	Total (867)	Under $15K (158)	$15K-$24,999 (167)	$25K-$34,999 (158)	$35K+ (199)
Receive Circulars	46%	38%	47%	42%	54%
From:					
Supermarkets	17%	17	17	16	19
"Local merchants"	15	11	15	15	11
Department stores	7	8	5	10	8
Restaurants/fast food stores	6	6	10	6	6
Home improvement	5	6	2	4	8
Household services	5	3	5	4	7
Discount stores	4	5	2	3	7
Drug stores	3	3	4	3	4
Other	13	13	10	11	18
Circulars received in an average week (MEAN)	1.0	0.8	0.9	0.9	1.3

Questions: "Do you also get advertising that doesn't come through the mail but is just left at your door?"

(IF YES) "Just making a rough guess, about how many circulars or flyers are left at your door in an average week? I mean advertising that is left at your door."
"For what kinds of stores is this advertising?"

Households which spent larger amounts per week on groceries were about as likely as other households to receive supermarket circulars: the range was only between 15 percent among households spending $50-$75 a week and 21 percent among households spending $76-100 per week on groceries (see Table 4.2). By way of contrast, adults with the highest grocery expenditures were the most likely of all both to read four or five Monday-to-Friday issues of the daily newspaper (62%) and to read the Sunday paper every week (68%). These findings clearly show the greater reach afforded by the daily and Sunday paper.

Table 4.2

NEWSPAPER READERSHIP AND SUPERMARKET CIRCULARS
BY WEEKLY GROCERY EXPENDITURE

		Weekly Grocery Expenditure			
Base: Total Respondents	Total (867)	Under $50 (270)	$50-$75 (312)	$76-$100 (150)	$100+ (121)
Receive supermarket circulars	17%	17%	15%	21%	17%
Read daily newspaper yesterday	65	63	63	65	70
Frequent daily newspaper reader (4-5 weekdays)	56	53	56	59	62
Read Sunday newspaper on all of last four Sundays	59	51	60	65	68

Questions: "Just making a rough guess, how much would you say your household spends per week on groceries - less than $50, between $50 and $75, between $76 and $100, or more than $100?"

Respondents were also asked questions about the 232 circulars they received on the day of the call-back interview (see Table 4.3). The largest proportions of these circulars were sent by mass merchandisers (33%), local stores (25%), and supermarkets (16%).

Almost nine-tenths (88% -- 204 out of 232) of these circulars were thrown out. Unless they had already been used for that day's shopping or some mental or written note of their content had been made before the interview, the vast preponderance of circulars could not have influenced consumers' shopping decisions.

Table 4.3

ONE DAY'S CIRCULARS

Base: Total Circulars	Total (232)
Mass merchandisers	33%
Local stores	25
Supermarkets	16
Local services	5
Shoppers	5
Other	16

Question: "Could you bring to the phone all of today's circulars, that is, advertising left at your door or hung on the outside of your mail-box. Who sent it?"

Ad Mail Sent To Places Of Work

Respondents were asked if there were any working adults in their household. Three fourths (78%) of American households had at least one working adult (see Table 4.4). Respondents in these households were asked to send in all the unwanted ad mail sent to all working household members on the day of the call-back interview.

Table 4.4

AD MAIL AT PLACE OF WORK

	Total	Under $15K	$15K-$24,999	$25K-$34,999	$35K+
Base: Households With Employed Adults	(666)	(71)	(138)	(140)	(185)
Receive Ad Mail At Place Of Work					
Yes	26%	16%	15%	30%	37%
No	74	85	85	70	63

Questions: "Including yourself, how many adults in your household are currently employed, either part-time or full-time?"

"Do you (or any of these employed adults in your household) receive any advertising mail in the work place?"

A total of 69 pieces of ad mail addressed to places of work were sent in (see Table 4.5). The principal advertisers sending these pieces were publishers (33%), vendors of office products and equipment (26%), and organizations offering education or training (19%). (Table A.18 shows the physical characteristics of business direct mail.)

Table 4.5

WHO SENT BUSINESS ADVERTISING MAIL

Base: Ad Mail Sent To Place Of Work	Total (69)
Publishers	33%
Office products/equipment	26
Education/training	19
Local services	7
Other	14

SECTION FIVE. ATTITUDES TOWARD ADVERTISING MEDIA

Consumers' attitudes toward direct mail are a prime element in determining how they respond to the mail advertising they receive on any given day. This section examines American adults' opinions about mail and newspaper advertising, circulars, and the advertising medium that is the most believable.

Attitudes Toward Mail Vs. Newspaper Advertising

Consumers hold much more favorable attitudes toward newspaper advertising than they hold toward advertising mail. By margins of four-to-one, they said that newspaper advertising, rather than advertising mail, "makes it easier to compare prices at different stores" (78% vs. 19%) and "helps me decide where to shop" (77% vs. 18%) (see Table 5.1). Two other statements were evaluated as more favorable to ads in daily newspapers than to ad mail by approximately two-to-one margins: "advertises the kinds of products I'm most interested in buying" (65% vs. 29%), and "gets me when I'm in the mood to read" (62% vs. 34%). A final statement, "makes products look a lot better than they are," found ad mail viewed critically far more often (66% vs. 28%) than newspaper ads.

Table 5.1

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING

	Percent Saying		
	Newspapers	Direct Mail	DK/NA
Makes it easier to compare prices at different stores	78%	19%	3%
Helps me to decide where to shop	77	18	5
Advertises the kinds of products I'm most interested in buying	65	29	5
Gets me when I'm in the mood to read	62	34	4
Makes products look a lot better than they are	28	66	6

Question: "Now I'd like to read some short statements about advertising. After I read each one, please tell me whether that statement is more true of mail advertising or daily newspaper advertising?"

The edge that newspapers have over ad mail exists in the judgments of consumers in all income groups (see Table 5.2). Respondents in all age groups, especially over the age of 30, were also more favorably disposed toward newspaper than toward mail advertising on the key statements of comparing prices, where to shop, and advertising the products they want to buy. Ad mail got slightly better relative ratings from the 18-29 age group and from those with household incomes under $15,000, but even there, the great majority favored newspapers.

Regardless of how receipt of ad mail was measured--by the number of pieces in one day's mail, the number of pieces in an average week, or by the frequency with which they receive direct mail--adults who received more ad mail were more likely than their counterparts to say that mail advertising "makes products look a lot better than they really are." And recipients of light as well as heavy volumes of ad mail nevertheless consistently preferred newspaper advertising.

Overall, more than one-half (52%) of American adults favored daily newspaper over mail advertising on four (36%) or all five (16%) of the statements discussed above (see Table 5.3). Only 13 percent selected ad mail over newspaper advertising on four or on all five statements.

Table 5.2

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING
AMONG DEMOGRAPHIC GROUPS

	Percent Who Favor Newspaper Advertising				Mail Ads Look
	Prices	Where	Pro-ducts	Mood	Too Good
Total	78%	77%	65%	62%	66%
By Income					
Under $15,000	70%	70%	60%	61%	53%
$15,000-$24,999	79	77	65	62	69
$25,000-$34,999	82	74	67	60	68
$35,000+	80	79	65	60	73
By Age					
18-29	76	72	57	65	67
30-44	79	79	68	56	68
45-64	80	81	68	65	71
65+	73	73	67	63	54
By Education					
Less than H.S. grad	72	68	63	68	58
High school graduate	76	78	68	60	67
1-3 years of college	80	81	66	61	70
College graduate	81	76	61	63	66
By Sex					
Male	81	79	69	67	68
Female	77	76	63	59	64
By Marital Status					
Married	78	78	67	62	71
Divorced/widowed/ separated	78	72	63	57	57
Never married	76	79	59	68	63
By Number Of Adults					
One	78	72	63	60	57
Two	78	78	67	61	68
Three or more	77	81	63	66	71
By Region					
Northeast	75	74	61	59	62
North central	78	77	64	64	66
South	76	77	66	62	67
West	83	80	69	60	69

(Continued)

Table 5.2

COMPARISON OF MAIL AND NEWSPAPER ADVERTISING
AMONG DEMOGRAPHIC GROUPS
(Continued)

	Percent Who Favor Newspaper Advertising				Mail Ads Look
	Prices	Where	Pro-ducts	Mood	Too Good
Total	78%	77%	65%	62%	66%
By Ad Mail Today					
None	78%	75%	65%	63%	67%
1-2 pieces	80	78	68	62	68
3+ pieces	80	79	67	56	72
By Receipt Of Ad Mail					
Daily	78	77	65	60	69
Several times a week	80	79	68	66	68
Once a week or less	74	73	62	58	52
By Ad Mail In Average Week					
0-5 pieces	76	74	65	61	63
6-10 pieces	79	82	67	64	64
11+ pieces	80	75	65	62	74
By Newspaper Readership					
Yesterday readers	82	82	70	67	66
Yesterday non-readers	71	68	56	52	66
Frequent readers	81	84	70	67	65
Infrequent readers	78	71	62	58	67
Non-readers	53	57	45	41	64

"Prices" : Makes it easy to compare prices at different stores
"Where" : Helps me decide where to shop
"Products" : Advertises the kinds of products I'm most interested in buying
"Mood" : Gets me when I'm in the mood to read
"Look Too Good": Makes products look a lot better than they really are

Table 5.3

SUMMARY OF COMPARISONS OF MAIL AND NEWSPAPER ADVERTISING AMONG DEMOGRAPHIC GROUPS

	Number Of Ratings In Favor Of Newspaper Advertising				
	All 5	4	3	2	1/0
Total*	16%	36%	25%	11%	13%
By Income					
Under $15,000	22%	30%	22%	10%	16%
$15,000-$24,999	17	34	24	13	13
$25,000-$34,999	11	35	35	10	9
$35,000+	11	37	26	13	13
By Age					
18-29	12	34	29	12	14
30-44	13	32	30	14	11
45-64	14	42	21	11	11
65+	30	32	18	6	15
By Sex					
Male	15	40	25	10	9
Female	16	34	25	12	14
By Number Of Adults					
One	21	32	24	9	14
Two	15	36	25	11	13
Three or more	9	40	27	15	10
By Region					
Northeast	16	31	32	9	12%
North central	15	38	22	14	11
South	16	36	22	12	14
West	15	37	28	8	12
By Receipt Of Ad Mail					
Daily	13	36	26	11	15
Several times a week	16	38	25	12	10
Once a week or less	22	31	24	10	13
By Ad Mail In Average Week					
0-5 pieces	18	33	26	10	14
6-10 pieces	17	34	30	9	10
11+ pieces	11	42	18	17	13
By Newspaper Readership					
Yesterday readers	17	39	26	10	9
Yesterday non-readers	13	29	24	14	20
Frequent readers	19	39	24	10	9
Infrequent readers	12	34	27	13	13
Non-readers	9	23	24	12	32

* Base: Answered all five statements.

Preferred Medium For Department Store Sale Booklets

A slightly higher proportion of American adults preferred booklets advertising a department store sale inserted in the Sunday newspaper rather than sent through the mail (43% vs. 39%) (see Table 5.4). The remaining one-fifth of the sample (18%) had no preference as between the two.

Three-fifths (63%) of the respondents said they have department stores credit cards. Those who have department store charge cards were as likely as those who do not have them to prefer department store sale booklets inserted in the Sunday paper.

Preferred Medium For Grocery Ads

Seventy percent of American adults preferred grocery ads in daily newspapers; the remainder were equally divided between those who preferred these ads in circulars left at their doors (14%) and those who had no preference between daily newspapers and circulars (16%) (see Table 5.5).

Respondents whose households spent at least $100 per week on groceries were slightly less likely than their counterparts to prefer their grocery ads left at their doors.

Table 5.4

PREFERRED MEDIUM FOR DEPARTMENT STORE SALE BOOKLETS

Base: Total Respondents	Total	Own Department Store Credit Cards	
		Yes	No
	100%	63%	37%
	(867)	(547)	(320)
Prefer Department Store Sale Booklets			
In Sunday newspaper	43%	42%	43%
By mail	39	40	38
No preference	18	18	18

Question: "Sometimes the same ad is distributed in more than one way. For example, the Sunday newspaper might contain a circular or booklet advertising a department store sale, and the same item might also be sent through the mail. How would you rather get a department store ad of this type -- through the mail or in a newspaper?"

Table 5.5

PREFERENCE FOR GROCERY ADS IN NEWSPAPERS OR CIRCULARS BY GROCERY EXPENDITURE

Base: Total Respondents	Total	Weekly Grocery Expenditure			
		Under $50	$50-$75	$76-$100	$100+
	(867)	(270)	(312)	(150)	(121)
In newspapers	70%	66%	73%	71%	69%
Left at door	14%	15	16	15	9
No preference	16	19	12	14	22

Question: "Do you prefer grocery ads in daily newspaper or grocery ads left at your door?"

Most Believable Advertising Medium

In the first interview, all respondents were asked to select the most believable advertising medium from among mail advertising, newspapers, television, radio, and magazines. Almost one-half (48%) chose newspapers, 21 percent named television, and 8 percent each picked magazines and mail advertising (see Table 5.6). The remainder answered either "radio" (4%), "all media are equally believable" (6%), or gave no answer (6%). (These responses are not shown in Table 5.6.)

Older (45+) respondents and recipients of at least 3 pieces of ad mail on the day of the call-back interview were more likely than others to have picked newspapers as the most believable advertising medium. Income and education did not significantly influence the choice of newspapers as the most believable advertising medium.

Respondents in households with under $15,000 incomes were relatively more likely than others to name mail advertising as the most believable medium (13%). Respondents who never read either a daily or a Sunday paper (12%) were also relatively more favorable toward ad mail. (Appendix Table A.4 shows that there was a substantial overlap between these two groups.) But for them as for others, newspapers were chosen most often as the most believable advertising medium.

Table 5.6

MOST BELIEVABLE ADVERTISING MEDIUM
AMONG DEMOGRAPHIC GROUPS

	Newspapers	Television	Magazines	Ad Mail
Total	48%	21%	8%	8%
By Income				
Under $15,000	44	23	4	13
$15,000-$24,999	47	21	9	7
$25,000-$34,999	48	22	11	8
$35,000+	48	17	12	5
By Age				
18-29	41	27	11	8
30-44	43	21	10	7
45-64	54	18	8	8
65+	55	19	4	6
By Education				
Less than H.S. grad	44	25	6	9
High school graduate	49	26	4	7
1-3 years of college	49	17	11	8
College graduate	46	17	13	7
By Sex				
Male	46	24	10	6
Female	49	20	8	8
By Marital Status				
Married	49	21	8	8
Divorced/widowed/ separated	44	22	7	8
Never married	47	20	13	5
By Number Of Adults				
One	46	22	9	8
Two	47	22	9	8
Three or more	53	19	7	5

(Continued)

Table 5.6

MOST BELIEVABLE ADVERTISING MEDIUM
AMONG DEMOGRAPHIC GROUPS
(Continued)

	Newspapers	Television	Magazines	Ad Mail
Total	48%	21%	8%	8%
By Region				
Northeast	55	18	11	9
North central	56	18	7	9
South	41	24	8	6
West	49	19	8	7
By Ad Mail Today				
None	50	19	7	10
1-2 pieces	49	21	8	8
3+ pieces	54	15	8	6
By Ad Mail In Average Week				
0-5 pieces	46	22	6	9
6-10 pieces	50	20	9	8
11+ pieces	48	22	11	5
By Newspaper Readership				
Yesterday readers	55	18	7	6
Yesterday non-readers	34	26	11	11
Frequent readers	56	18	7	5
Infrequent readers	41	24	9	10
Non-readers	17	31	16	12

Question: "Television, radio, newspapers, magazines, and advertising by mail all carry advertising. Which of these five media would you say has the most believable advertising. Is it mail advertising, newspapers, television, radio, or magazines?"

APPENDIX A: TABLES

Table A.1

RESPONDENT BASES

Total Respondents	First Interview (867)	Second Interview Total (658)	Second Interview Rec'd Ad Mail (447)	Third Interview Total (599)	Third Interview Rec'd Ad Mail (272)
By Income					
Under $15,000	158	119	67	107	48
$15,000-$24,999	167	135	85	125	51
$25,000-$34,999	158	130	92	118	58
$35,000-$49,999	126	105	79	94	49
$50,000+	73	58	53	51	30
No answer	185	111	71	104	35
By Age					
18-24	98	76	49	61	22
25-29	119	95	53	80	28
30-34	123	94	70	89	39
35-44	140	117	79	112	55
45-54	120	90	70	86	41
55-64	111	85	63	80	49
65+	144	96	60	87	35
By Education					
Less than H.S. grad	112	86	47	78	26
High school graduate	318	239	146	219	96
1-3 years of college	211	169	128	150	65
College graduate	158	109	85	99	53
Postgraduate work	57	49	36	47	29
By Sex					
Male	280	212	143	191	88
Female	587	446	304	408	183
By Marital Status					
Married	541	423	311	385	187
Divorced/widowed/ separated	192	143	83	136	55
Never married	123	88	50	75	29
By Number Of Adults					
One	222	162	94	150	67
Two	491	371	263	337	152
Three or more	154	125	90	112	52

(Continued)

Table A.1

RESPONDENT BASES
(Continued)

Total Respondents	First Interview (867)	Second Interview Total (658)	Second Interview Rec'd Ad Mail (447)	Third Interview Total (599)	Third Interview Rec'd Ad Mail (272)
By Number Of Adults In HH Currently Employed					
None	194	135	84	126	61
One	302	230	151	210	92
Two	295	237	171	217	101
Three or more	69	56	41	46	17
By Region					
Northeast	171	125	82	114	53
North central	244	192	131	175	81
South	283	209	130	191	81
West	166	130	102	118	56
By Ad Mail Today					
None	NA	212	-	327	-
1-2 pieces	NA	222	222	201	201
3+ pieces	NA	225	225	71	71
By Receipt Of Ad Mail					
Daily	363	279	218	253	120
Several times a week	341	260	162	237	118
Once a week or less	161	117	65	107	33
By Ad Mail In Average Week					
0-5 pieces	321	240	129	216	87
6-10 pieces	308	237	178	216	98
11+ pieces	226	175	138	161	84
By Newspaper Readership					
Yesterday readers	561	424	303	391	185
Yesterday non-readers	306	234	144	208	87
Frequent readers	489	373	268	345	169
Infrequent readers	303	238	158	215	87
Non-readers	75	47	21	39	16

Table A.2

RESPONDENT PROFILES

	First Interview	Second Interview		Third Interview	
		Total	Rec'd Ad Mail	Total	Rec'd Ad Mail
Total Respondents	(867)	(658)	(447)	(599)	(272)
By Income					
Under $15,000	18%	18%	15%	18%	18%
$15,000-$24,999	19	21	19	21	19
$25,000-$34,999	18	20	21	20	21
$35,000-$49,999	15	16	18	16	18
$50,000+	8	9	12	9	11
No answer	21	17	16	17	13
By Age					
18-24	11	12	11	10	8
25-29	14	14	12	13	10
30-34	14	14	16	15	14
35-44	16	18	18	19	20
45-54	14	14	16	14	15
55-64	13	13	14	13	18
65+	17	15	13	15	13
By Education					
Less than H.S. grad	13	13	11	13	10
High school graduate	37	36	33	37	35
1-3 years of college	24	26	29	25	24
College graduate	18	17	19	17	19
Postgraduate work	7	7	8	8	11
By Sex					
Male	32	32	32	32	32
Female	68	68	68	68	67
By Marital Status					
Married	62	64	70	64	69
Divorced/widowed/ separated	22	22	19	23	20
Never married	14	13	11	13	11
By Number Of Adults					
One	26	25	21	25	25
Two	57	56	59	56	56
Three or more	18	19	20	19	19

(Continued)

Table A.2

RESPONDENT PROFILES
(Continued)

	First Inter-view	Second Interview		Third Interview	
		Total	Rec'd Ad Mail	Total	Rec'd Ad Mail
Total Respondents	(867)	(658)	(447)	(599)	(272)
By Number Of Adults In HH Currently Employed					
None	22%	21%	19%	21%	22%
One	35	35	34	35	34
Two	34	36	38	36	37
Three or more	8	9	9	8	6
By Region					
Northeast	20	19	18	19	19
North central	28	29	29	29	30
South	33	32	29	32	30
West	19	20	23	20	21
By Ad Mail Today					
None	NA	32	-	55	-
1-2 pieces	NA	34	50	34	74
3+ pieces	NA	34	50	12	26
By Receipt Of Ad Mail					
Daily	42	42	49	42	44
Several times a week	39	40	36	40	43
Once a week or less	19	18	15	18	12
By Ad Mail In Average Week					
0-5 pieces	37	36	29	36	32
6-10 pieces	36	36	40	36	36
11+ pieces	26	27	31	27	31
By Newspaper Readership					
Yesterday readers	65	64	68	65	68
Yesterday non-readers	35	36	32	35	32
Frequent readers	56	57	60	58	62
Infrequent readers	35	36	35	36	32
Non-readers	9	7	5	7	6

Table A.3

ONE DAY'S MAIL

	Average Number Of Pieces					
	Total	Personal Letters	Maga-zines	Bills/ State-ments	Other Bus. Mail	Ad Mail
Total Respondents	3.9	0.6	0.3	0.9	0.7	1.6
By Income						
Under $15,000	3.1	0.5	0.3	0.6	0.6	1.3
$15,000-$24,999	3.5	0.5	0.2	0.8	0.5	1.6
$25,000-$34,999	3.7	0.4	0.2	0.9	0.6	1.6
$35,000+	5.0	0.7	0.4	1.2	1.1	1.9
By Age						
18-29	3.2	0.6	0.2	0.8	0.6	1.1
30-44	3.9	0.5	0.3	1.1	0.7	1.6
45-64	4.7	0.6	0.3	0.9	0.8	2.1
65+	3.6	0.8	0.3	0.6	0.7	1.5
By Education						
Less than H.S. grad	2.9	0.5	0.2	0.7	0.3	1.2
High school graduate	3.5	0.5	0.3	0.8	0.6	1.4
1-3 years of college	4.1	0.5	0.3	1.0	0.8	1.8
College graduate	4.9	0.7	0.3	1.0	1.0	2.0
By Sex						
Male	3.7	0.5	0.3	0.4	0.7	1.6
Female	4.0	0.6	0.3	0.5	0.7	1.6
By Marital Status						
Married	4.3	0.6	0.3	1.0	0.8	1.8
Divorced/widowed/ separated	3.2	0.4	0.2	0.7	0.5	1.4
Never married	3.2	0.7	0.2	0.7	0.5	1.2
By Number Of Adults						
One	3.4	0.5	0.2	0.6	0.6	1.6
Two	4.0	0.6	0.3	0.9	0.8	1.6
Three or more	4.3	0.6	0.3	1.2	0.8	1.6

(Continued)

Table A.3

ONE DAY'S MAIL
(Continued)

	Average Number Of Pieces					
	Total	Personal Letters	Maga-zines	Bills/ State-ments	Other Bus. Mail	Ad Mail
Total Respondents	3.9	0.6	0.3	0.9	0.7	1.6
By Region						
Northeast	4.0	0.8	0.3	1.0	0.8	1.4
North central	3.9	0.5	0.3	1.0	0.8	1.6
South	3.4	0.4	0.2	0.8	0.7	1.4
West	4.6	0.6	0.3	0.9	0.7	2.1
By Receipt Of Ad Mail						
Daily	4.8	0.7	0.3	1.0	0.9	2.1
Several times a week	3.4	0.5	0.3	0.8	0.6	1.3
Once a week or less	2.8	0.4	0.2	0.8	0.4	1.1
By Ad Mail In Average Week						
0-5 pieces	2.8	0.4	0.2	0.8	0.5	1.0
6-10 pieces	4.2	0.6	0.3	0.9	0.8	1.7
11+ pieces	5.1	0.6	0.4	1.0	0.9	2.3
By Newspaper Readership						
Yesterday readers	4.2	0.6	0.3	0.9	0.8	1.7
Yesterday non-readers	3.4	0.5	0.2	0.8	0.5	1.4
Frequent readers	4.3	0.6	0.3	1.0	0.8	1.7
Infrequent readers	3.5	0.5	0.2	0.9	0.6	1.4
Non-readers	2.9	0.4	0.2	0.6	0.4	1.4

Questions: "Could you bring all of today's mail to the phone -- even the catalogs and the mail you would have thrown out? How many pieces of mail were delivered, all together?"

"Please tell me how many personal letters you received today. How many bills or statements are there in today's mail? How many regular magazines are there? And how many other pieces of mail from people you do business with?"

"How many pieces of advertising mail are there? I mean things like catalogs, coupons, political, church, or charitable fund raising mail, and advertising in bills or statements?"

Table A.4

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS

Total Respondents	Yesterday Readers 65%	Frequent Readers 56%	Infrequent Readers 35%	Non-Readers 9%	All 4 Of Last 4 Sundays 46%
By Income					
Under $15,000	55%	49%	32%	9%	46%
$15,000-$24,999	55	44	47	9	52
$25,000-$34,999	61	56	37	8	61
$35,000+	78	69	28	4	72
By Age					
18-29	51	37	51	12	49
30-44	63	57	35	8	60
45-64	74	67	29	4	69
65+	73	68	22	10	57
By Education					
Less than H.S. grad	53	40	43	17	41
High school graduate	62	53	37	10	57
1-3 years of college	66	59	35	6	65
College graduate	74	68	28	4	69
By Sex					
Male	70	63	30	7	65
Female	62	53	37	10	57
By Marital Status					
Married	66	60	34	7	63
Divorced/widowed/ separated	63	51	37	12	52
Never married	63	52	38	10	57
By Number Of Adults					
One	63	52	36	12	55
Two	65	58	34	8	61
Three or more	68	57	36	7	60

(Continued)

Table A.4

NEWSPAPER READERSHIP AMONG DEMOGRAPHIC GROUPS
(Continued)

	Yesterday Readers	Frequent Readers	Infrequent Readers	Non-Readers	All 4 Of Last 4 Sundays
Total Respondents	65%	56%	35%	9%	46%
By Region					
Northeast	60%	50%	42%	9%	64%
North central	67	60	33	7	55
South	63	54	37	9	62
West	69	61	28	11	58
By Ad Mail Today					
None	60	53	39	8	58
1-2 pieces	67	59	36	5	63
3+ pieces	68	63	32	5	65
By Receipt Of Ad Mail					
Daily	68	61	32	7	61
Several times a week	65	57	35	8	60
Once a week or less	57	46	42	12	57
By Ad Mail In Average Week					
0-5 pieces	56	47	40	13	53
6-10 pieces	72	62	31	7	64
11+ pieces	66	62	32	6	63
By Newspaper Readership					
Yesterday readers	100	84	16	-	71
Yesterday non-readers	-	7	69	24	38
Frequent readers	94	100	-	-	77
Infrequent readers	30	-	100	-	46

Questions: "I'd like to ask you to tell me whether you have read or looked at a daily newspaper on any other of the last seven days. Let's start with a week ago today, that is last (DAY OF INTERVIEW)? Did you read a daily paper on (INSERT EACH DAY OF WEEK EXCEPT THOSE ALREADY ANSWERED.)"

"On how many of the last four weekends, if any, did you read or look at a Sunday edition of a newspaper?"

Table A.5

DETAILED DISTRIBUTION OF AD MAIL
BY CATEGORY OF ADVERTISER
(Raw Numbers)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
NATION-WIDE MAIL ADS	727	165	562
Publishers	343	59	284
Magazine subscription solicitations	209	30	179
Books/encyclopedias	107	17	90
Newspaper subscription soliciatations	4	2	2
Other publishers	23	10	13
Non-Profit	102	15	87
Military	8	2	6
Religious	26	2	24
National (Girl Scouts)/fraternal	14	2	12
National political issues	9	-	9
Charities	45	9	36
Insurance/Financial	96	14	82
Financial: investments/credit companies/services	34	9	25
Insurance	62	5	57
Coupons	98	48	50
Individual manufacturer's coupons	31	13	18
Assorted coupons, e.g., Carol Wright	67	35	32
Miscellaneous Industries	44	15	29
Hotels/resort areas/recreation parks	14	1	13
Real estate	10	3	7
Automotive	16	9	7
Other miscellaneous industries	4	2	2
All Other National	44	14	30
Business seminars	3	-	3
Other educational	6	-	6
Free samples	2	2	-
Other national	33	12	21

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL
BY CATEGORY OF ADVERTISER
(Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
MAIL ORDER GOODS	409	133	276
Multi Gifts/Gadgets	92	36	56
Single Category Catalogs	242	79	163
Gardening	51	29	22
Women's/girls' apparel	34	6	28
Men's/boys' apparel	7	1	6
Leisure/sporting goods	4	3	1
Women's and men's apparel	24	11	13
Crafts	15	8	7
Recordings/music/TV	35	2	33
Office products	4	1	3
Collectibles (coins, etc.)	34	6	28
Cosmetics/beauty supplies	17	6	11
Jewelry	4	2	2
Other single category catalogs	13	4	9
Single Items/General Merchandise	75	18	57
General merchandise (luggage, etc.)	41	8	33
Oil company mail offers	10	1	9
Other credit card mail offers	11	3	8
Mail order food items	13	6	7
LOCAL	476	120	356
Total Stores	178	65	113
Department stores	33	19	14
Other Local Stores	145	46	99
Women's/girl's apparel	10	7	3
Men's/boys' apparel	1	-	1
Furniture/carpet	34	1	33
Pizza parlors/restaurants	27	14	13
Deli	2	1	1
Local grocery store	34	11	23
All other local stores	37	12	25

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL
BY CATEGORY OF ADVERTISER
(Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
LOCAL, Continued	476	120	356
Shoppers	51	11	40
Services	89	15	74
Auto repair	11	2	9
Lawn care/landscaping	2	1	1
Construction	7	2	5
Carpet cleaners	7	-	7
Health clubs	2	-	2
Medical/health: hospitals/doctors/ dentists	19	6	13
Public utilities	2	-	2
Financial: banks/investments/advisory	19	2	17
Other local services	20	2	18
Educational/Entertainment/Cultural	43	11	32
Colleges	16	5	11
Adult education	6	-	6
Special schools/programs for children	1	-	1
Other local educational	5	1	4
Cable ads (radio/TV programs/ advertising)	7	2	5
Other local entertainment	4	2	2
Cultural/entertainment (galleries, opera, etc.)	4	1	3
Political	17	3	14
Candidates for national office	8	1	7
Candidates for state, local office	5	1	4
Local, state issues/fundraising	2	-	2
Other local political	2	1	1
Shared Mail	55	1	54
Other Local	43	14	29
Religious	7	4	3
Vacation resorts	7	3	4
Mixed coupons	1	1	-
Local newspapers	25	6	19
Other miscellaneous local	3	-	3

(Continued)

Table A.5

DETAILED DISTRIBUTION OF AD MAIL
BY CATEGORY OF ADVERTISER
(Continued)

Base: Ad Mail Pieces From Known Source	Total (1874)	Kept (501)	Thrown Away (1373)
MASS MERCHANDISERS	262	83	179
National Chains	54	26	28
Sears	25	12	13
J. C. Penney	14	10	4
Montgomery Ward	12	3	9
Other national chains	3	1	2
Discount Chains	69	15	54
K Mart	29	7	22
Other (e.g., Zayre, Target, Walmart)	40	8	32
Supermarkets	43	17	26
A&P	-	-	-
Safeway	5	2	3
Kroger	6	1	5
Winn-Dixie	3	-	3
Pathmark	-	-	-
American (Acme/Alpha Beta/Buttrey/ Jewel/Skaggs, Star)	3	1	2
Lucky	-	-	-
Supermarket (not specified)	4	3	1
Other supermarket (not listed)	22	10	12
Other Mass Merchandisers	96	25	71
Home centers (lumber, hardware, etc.)	60	16	44
Drugstores	27	8	19
Radio Shack	9	1	8
Combinations			
Total retail stores (local stores + mass merchandisers)	440	148	292
Total retail (total retail stores + mail order goods)	849	281	568

Table A.6

WHAT AD MAIL PIECE WAS ABOUT

Base: Total Ad Mail Pieces	Total (1880)
Sales/specials/discounts	18%
Advertising	16
Subscriptions	10
Coupons	9
Products	8
Memberships	7
Catalogs/brochures	6
Contest/giveaways/sweepstakes	6
Insurance/banking/investments	4
Services	3
Clothing	3
Newspaper/newsletter	3
Donations	3
Seminars/course offerings	2
Travel/recreation	1
Politics	1
Bills	1
Credit cards	1
Free sample	1

Table A.7

WHAT AD MAIL WAS ABOUT
(Major Mentions By Category of Advertiser)

NATIONAL ADVERTISERS	
Magazines	(209)
Subscriptions	75%
Contests	19
Books/Encyclopedias	(107)
Memberships	49%
Advertising	14
Products	11
Subscriptions	8
Non-Profit	(102)
Donations	43%
Memberships	11
Newspaper/newsletter	8
Subscriptions	8
Contests	8
Coupons	(98)
Coupons	90%
Advertising	5
Insurance/ Financial	(96)
Insurance/banking/ investments	60%
Services	16
Credit cards	10
Advertising	7
MASS MERCHANDISERS	(260)
Sales/discounts	51%
Products	17
Catalogs	17

MAIL ORDER	
Multi Gifts/Gadgets	(92)
Catalogs	42%
Products	25
Sales/discounts	17
Contests	8
Single Category Catalogs	(242)
Catalogs	17%
Advertising	17
Clothing	17
Products	16
Memberships	12
Sales/discounts	10
LOCAL	
Retail Stores	(179)
Sales/discounts	53%
Coupons	15
Advertising	13
Clothing	7
Products	7
Services	(89)
Advertising	24%
Services	21
Coupons	21
Sales/discounts	7

Question: "What is it about?"

Table A.8

HOW AD MAIL WAS ADDRESSED

Total Ad Mail Pieces	(Base) (1880)	Individual 65%	Family 1%	Resident 19%	Postal Route Patron 6%	Wrong Name *%	No Address 8%
Nationwide (Net)	(727)	82	2	10	2	*	4
Publishers (Sub-Net)	(343)	93	3	3	1	-	1
Magazines	(209)	94	2	2	1	-	1
Books/encyclopedias	(107)	93	6	1	-	-	1
Non-profit	(102)	90	2	5	2	-	-
Coupons	(98)	29	2	51	7	-	10
Mail Order (Net)	(409)	94	*	2	1	*	2
Multi gifts/gadgets	(92)	91	-	7	1	-	1
Single category catalogs	(242)	95	-	1	1	*	2
Single items/gen. merchandise	(75)	96	1	-	1	-	1
Local (Net)	(476)	34	1	36	14	*	15
Retail stores	(178)	33	1	32	16	1	17
Services	(89)	49	1	12	7	1	29
Mass Merchandisers (Net)	(262)	25	1	40	13	*	20
National/discount chains	(123)	41	2	24	11	1	21

* Less than 0.5%

Question: "Is it addressed to you by name, to someone else in the household, to the family, to 'resident' or 'occupant,' or does it have a wrong name on it?"

Table A.9

WERE CONTENTS DELIVERED IN AN ENVELOPE?

	(Base)	Yes	No
Ad Mail Pieces- First Half Of January	(1389)	49%	51%
Nationwide (Net)	(574)	81	19
Publishers (Sub-Net)	(278)	87	13
Magazines	(172)	91	9
Books/encyclopedias	(89)	81	19
Non-profit	(84)	74	26
Coupons	(85)	76	24
Mail Order (Net)	(313)	52	48
Multi gifts/gadgets	(70)	29	71
Single category catalogs	(186)	56	44
Single items/general merchandise	(75)	51	49
Local (Net)	(322)	11	89
Retail stores	(107)	7	93
Services	(63)	32	68
Mass Merchandisers (Net)	(176)	7	93
National/discount chains	(88)	13	87

Note: Question asked only during first half of January.

Question: "Is it in an envelope?"

Table A.10
CONTENTS OF AD MAIL IN ENVELOPE

Ad Mail Pieces In Envelope-(Thrown Out)	(Base)	Letter	Card	Brochure	Coupons	Return Card/ Envelope	Flyer	Small Related Brochures	PS Note	Stamps	Samples	Other
	(543)	79%	6%	44%	13%	90%	25%	15%	35%	9%	4%	8%
Nationwide (Net)	(376)	83	8	42	9	90	30	11	35	7	1	11
Publishers (Sub-Net)	(211)	94	11	56	1	95	24	9	44	10	1	8
Magazines	(141)	95	13	45	1	95	24	11	40	9	-	9
Books/encyclopedias	(62)	97	5	84	2	97	21	2	49	13	5	7
Non-profit	(57)	70	4	19	-	95	30	4	28	9	-	26
Coupons	(30)*	/	3	3	90	60	27	43	13	3	7	-
Mail Order (Net)	(138)	69	4	54	22	96	15	28	38	17	14	2
Single category catalogs	(91)	67	2	55	23	98	19	13	48	25	17	2
Single items/general merchandise	(33)*	76	6	64	12	94	9	46	9	-	9	7

(Continued)

* Caution: Small base.

Note: Question asked only during the first half of January.

Table A.10

CONTENTS OF AD MAIL IN ENVELOPE
(Continued)

Base: Ad Mail Pieces In Envelope (Kept)	Total (133)	Nationwide			Mail Order (25)*
		Total (89)	Publishers (31)*	Coupons (35)*	
Letter	47%	47%	81%	6%	52%
Card	20	20	32	3	12
Brochure	29	19	39	6	60
Coupons	38	49	13	94	8
Return envelope	36	33	80	3	40
Sample	5	7	3	14	4
Bills	3	1	3	-	4
Other	20	19	19	11	28

* Caution: Small base size.

Note: Multiple responses possible.

Note: Question asked only during first half of January.

Question: "What is in the envelope?"

Table A.11

FORMAT OF ADS NOT IN ENVELOPE

Ad Mail Pieces Not In Envelope	(Base)	Circular	Catalog	Folder/ Brochure	Shopping Guide	Card	Flyer
	(712)	23%	30%	8%	5%	17%	6%
Nationwide (Net)	(108)	5	21	18	2	22	6
Mail Order (Net)	(150)	7	83	5	1	3	-
Single category catalogs	(81)	6	83	5	-	5	-
Local (Net)	(288)	18	8	10	8	32	12
Retail stores	(99)	41	14	9	1	17	11
Services	(43)	7	2	7	-	40	30
Mass Merchandisers (Net)	(162)	59	25	4	6	2	1
National/discount chains	(77)	51	34	4	4	3	-

Note: Question asked only during first half of January.

Question: "What is it?"

Table A.12

AD MAIL ITEMS THAT CAME
FOLDED WITH OTHER ITEMS

	(Base)	Folded With Other Items	Mean # Of Items
Ad Mail Pieces Not In Envelope	(712)	30%	6.4
Nationwide (Net)	(108)	21	*
Mail Order (Net)	(150)	3	*
Multi gifts/gadgets	(50)	2	*
Single category catalogs	(81)	4	*
Local (Net)	(288)	40	6.8
Retail stores	(99)	38	6.4
Services	(43)	58	9.3
Mass Merchandisers (Net)	(163)	41	5.5
National/discount chains	(77)	38	6.0

* Base too small to permit meaningful data.

Note: Question asked only during first half of January.

Questions: "Did it come folded together with other items (like sections of a newspaper)?"
(YES) "How many items came folded together?"

Table A.13
USE OF COLOR BY CATEGORY OF ADVERTISER

Ad Mail Items Thrown Out	Base)	Black & White	Spot Color/ B&W	All Spot Color	B&W/ Process Color	All Process Color	One Color	Black Ink/ Colored Paper	2 color Ink/White Paper	Various
	(1058	13%	9%	4%	10%	15%	8%	8%	26%	7%
Nationwide (Net)	(464)	15	7	3	6	13	9	10	29	8
Publishers (Sub-Net)	(239)	14	8	4	7	14	8	9	28	9
Magazines	(153)	17	6	3	5	12	11	9	29	9
Books/encyclopedias	(76)	8	14	6	9	19	2	8	26	9
Non-profit	(75)	17	7	1	7	7	12	11	31	7
Coupons	(46)	2	12	3	12	24	8	5	21	12
Mail Order (Net)	(219)	11	4	5	13	25	6	6	21	8
Multi gifts/gadgets	(44)	1	3	-	22	40	4	8	13	8
Single category catalogs	(129)	14	5	8	11	21	7	7	20	8
Single items/general merchandise	(46)	9	3	1	13	27	7	4	29	7
Local (Net)	(253)	15	17	2	12	6	9	6	30	4
Retail stores	(68)	8	6	3	24	15	11	6	21	7
Services	(53)	15	5	2	5	2	11	8	48	3
Mass Merchandisers (Net)	(119)	3	30	16	21	9	1	4	14	3
National/discount chains	(62)	3	22	12	29	14	1	1	16	1

(Continued)

Note: Question asked only during first half of January.

Table A.13

USE OF COLOR BY CATEGORY OF ADVERTISER
(Continued)

Ad Mail Items Kept	(Base) (331)	Black & White 14%	Color 62%	Both 14%
Nationwide (Net)	(110)	13	63	25
Publishers	(39)	15	46	39
Coupons	(39)	8	87	5
Mail Order (Net)	(94)	5	72	22
Single category catalogs	(57)	7	68	25
Local (Net)	(69)	35	45	19
Retail stores	(39)	28	59	13
Mass Merchandisers (Net)	(57)	4	66	31

Note: Question asked only during the first half of January.

Question: "Are the contents printed in black and white or in color?"

Table A.14

TYPES OF PAPER USED BY CATEGORY OF ADVERTISER

Ad Mail Items Thrown Away	(Base) (1058)	Newsprint 12%	Roto 6%	Coated 38%	Letter 57%	Card 28%
Nationwide (Net)	(464)	4	3	41	84	37
Publishers (Sub-Net)	(239)	4	3	49	90	50
Magazines	(153)	-	2	43	93	49
Books/encyclopedias	(76)	11	3	63	86	55
Non-profit	(75)	4	-	23	84	19
Coupons	(46)	9	9	63	50	33
Mail Order (Net)	(219)	1	1	76	64	10
Multi gifts/gadgets	(44)	2	5	93	27	7
Single category catalogs	(129)	1	1	69	72	13
Single items/general merchandise	(46)	2	-	80	74	2
Local (Net)	(253)	20	5	14	27	38
Retail stores	(68)	16	13	29	19	25
Services	(53)	4	-	8	51	43
Mass Merchandisers (Net)	(119)	49	33	9	8	5
National/discount chains	(62)	26	50	13	11	6

(Continued)

Note: Multiple answers possible.

Table A.14

TYPES OF PAPER USED BY CATEGORY OF ADVERTISER
(Continued)

Ad Mail Items Kept	(Base)	Newsprint	Magazine	Letter	Card
	(331)	24%	54%	15%	8%
Nationwide (Net)	(110)	9	56	28	11
Publishers	(39)	13	39	39	18
Coupons	(39)	5	85	8	3
Mail Order (Net)	(94)	13	80	6	2
Single category catalogs	(57)	14	77	7	4
Local (Net)	(69)	31	32	18	19
Retail stores	(39)	33	41	10	15
Mass Merchandisers (Net)	(57)	66	33	2	-

Note: Multiple answers possible.

Note: Question asked only during the first half of January.

Question: "Excluding the envelope, is it printed on the kind of paper that daily newspapers are printed on, or the kind of paper that magazines are printed on, or is it printed on letter paper or on card stock?"

Table A.15

SIZE OF AD MAIL PIECES IN ENVELOPE

	(Base)	3x10 Or Smaller	4x6-4x11	5x10-6x9	8x10 Or Larger
Total Ad Mail Pieces In Envelope (Thrown Away)	(543)	2%	56%	34%	8%
Nationwide (Net)	(376)	3	51	36	10
Publishers (Sub-Net)	(211)	2	41	41	15
Magazines	(141)	1	50	43	6
Books/encyclopedias	(62)	2	23	39	36
Non-profit	(57)	7	72	18	4
Mail Order (Net)	(138)	1	63	32	4
Single category catalogs	(91)	1	67	28	3
Total Ad Mail Pieces In Envelope (Kept)	(133)	14%	18%	40%	26%

Note: Question asked only during January.

Question: "How big is it?"

Table A.16

SIZE OF AD MAIL PIECES NOT IN ENVELOPE

	(Base)	Under 8-1/2 x11	8-1/2 x11	8-1/2 x14-11x17	14x21	21x29
Total Ad Mail Pieces Not In Envelope (Thrown Away)	(514)	50%	22%	19%	5%	4%
Nationwide (Net)	(87)	60	33	7	-	-
Mail Order (Net)	(81)	61	36	4	-	-
Single category catalogs	(38)	53	45	3	-	-
Local (Net)	(232)	54	18	20	3	4
Retail stores	(64)	45	22	23	5	5
Services	(39)	64	26	10	-	-
Mass Merchandisers (Net)	(111)	28	14	35	17	6
National/discount chains	(56)	27	21	38	7	7

	(Base)	Under 8-1/2 x11	8-1/2 x11	Square	14x21	21x29
Total Ad Mail Pieces Not In Envelope (Kept)	(198)	25%	52%	9%	13%	2%
Mail Order (Net)	(69)	36	52	6	6	-
Single category catalogs	(43)	16	72	5	7	-
Local (Net)	(56)	27	54	9	9	2
Retail stores	(35)	20	57	11	9	3
Mass Merchandisers (Net)	(52)	8	50	12	25	6

Note: Question asked only during first half of January.

Question: "How big is it?"

Table A.17

MEAN NUMBER OF PAGES IN AD MAIL PIECES

	(Base)	Mean # Of Pages
Total Ad Mail Items- First Half Of January	(1389)	16.7
Nationwide (Net)	(574)	12.2
Publishers (Sub-Net)	(278)	11.5
Magazines	(172)	8.2
Books/encyclopedias	(89)	18.0
Non-profit	(84)	7.4
Coupons	(85)	26.3
Mail Order (Net)	(313)	32.8
Multi gifts/gadgets	(70)	65.1
Single category catalogs	(186)	26.0
Single items/general merchandise	(57)	15.2
Local (Net)	(322)	8.7
Retail stores	(107)	11.1
Services	(63)	5.9
Mass Merchandisers (Net)	(176)	17.4
National/discount chains	(88)	22.2

Note: Question asked only during first half of January.

Question: "About how many pages or sheets are there in it?"

Table A.18

CHARACTERISTICS OF BUSINESS DIRECT MAIL

	Total
Base: Total Items	(69)
What Is It About?	
Catalogs/brochures	22%
Subscriptions	19
Products	13
Sales/specials/discounts	12
Seminars/course offerings	10
Credit cards	6
Contests/giveaways	6
Advertising	4
Coupons	4
Other	5
Is The Item In An Envelope?	
Yes	44%
No	56
Number Of Pages In Item	
MEAN	21.1
Use Of Color	
All black and white	11%
Some pages B&W/some spot color	4
Some pages B&W/some process color	18
All process color	19
All 1-color ink, not black & white	5
Black ink on colored paper	8
2-color ink on white paper	25
Various	12
Kind Of Paper*	
Letter/flyer paper	55%
Coated paper	45
Card stock	10
Newsprint	6
Roto paper	1

* Multiple responses possible.

APPENDIX B:

ESTIMATING THE DOLLAR VOLUME OF DIRECT MAIL IN 1986

ESTIMATING THE DOLLAR VOLUME OF DIRECT MAIL IN 1986

This appendix outlines the procedure NAB used to estimate the dollar volume of direct mail in 1986. The identical procedure was employed for the 1982 estimate.

1. The direct mail sent in to the research company was coded into 21 categories: nationwide (6), mail order goods (3), local (8), and mass merchandisers (4).

2. NAB selected a representative sample of items from each of the 21 categories of ad mail.

3. Estimates of the cost-per-thousand (CPM) for printing and handling of the ad mail items selected in Step #2 were obtained from three professionals with experience in printing or direct mail. The average CPM for each category of ad mail was computed.

4. The percentage distribution of ad mail used to estimate the dollar volume of direct mail was the distribution by category obtained from the call-back interviews during the entire month of January 1986. The base was the 1874 pieces from known types of advertisers.

5. The number of pieces of third-class mail (55,974,251,000) and the postage ($5,746,750,000) for calendar year 1986 were obtained from the United States Postal Service (USPS).

6. Multiplying the number of pieces of third-class mail (Step #5) by the proportions of ad mail in each category (Step #4) yielded estimated numbers of pieces of direct mail in each category.

7. Multiplying the estimated amount of ad mail (Step #6) by the CPM for each category (Step #3) yielded an estimate for the total printing and handling costs for each category of ad mail.

8. Printing and handling costs ($8,561,805,000) for the totality of ad mail pieces was added to total third-class postage ($5,746,750,000) to produce the total costs for consumer direct mail ($14,308,555,000).

9. Postage costs were allocated to the 21 categories according to their respective percentages of printing and handling costs. These postage costs were added to the printing and handling costs (Step #7) to produce the estimates of total costs for each category of consumer direct mail.

10. Business-to-business direct mail was assumed to be one-third of the dollar volume of consumer direct mail. This yielded an estimate of $4,769,518,000 for business-to-business direct mail and an estimate of $19,078,073,000 for <u>total</u> direct mail costs.

The distribution of the dollar volume of direct mail by categories of advertiser were calculated in two ways: by the direct estimate of production and handling costs, as outlined above; and by assigning to each category a production and handling cost estimate equal to its October 1982 estimate plus 15 percent (see Table B.3, "Distribution of Consumer Ad Mail Costs By Category of Advertiser").

Table B.1

SOURCES OF AD MAIL: 1986 AND 1982

Base: Ad Mail Pieces From Known Sources	Jan. 1986 (1874)	Oct. 1982 (1006)
Nationwide Direct Mail (Net)	39%	29%
Publishers	18	8
Non-profit	5	7
Insurance/financial	5	5
Coupons	5	4
Miscellaneous industries	2	2
All other	2	3
Mail Order Goods (Net)	22	15
Multi gifts/gadgets	5	4
Single category catalogs	13	5
Single items/general merchandise	4	6
Local (Net)	25	33
Stores (Sub-net)	10	8
Department stores	2	4
All other stores	8	4
Shoppers	3	3
Services	5	6
Educational/entertainment/cultural	2	3
Political	1	10
Shared mail	3	NA
Other	2	2
Mass Merchandisers (Net)	14	22
National chains	3	7
Discount chains	4	6
Supermarkets	2	6
Other mass merchandisers	5	3
Combinations		
Total retail stores (local stores + mass merchandisers)	23%	31%
Total retail (total retail stores + mail order goods)	45	46

Table B.2

TOTAL PRODUCTUION COSTS: 1986 AND 1982
(Cost Per Thousand Pieces)

	Jan. 1986	Oct. 1982
Nationwide Direct Mail		
Publishers	$235	$175
Non-Profit	160	70
Insurance/financial	170	80
Coupons	160	200
Miscellaneous industries	130	120
All other national	105	90
Mail Order Goods		
Multi gifts/gadgets	250	270
Single category catalogs	165	220
Single items, general merchandise	190	100
Local		
Total Stores		
Department stores	135	275
Other stores	85	110
Shoppers	95	60
Services	85	25
Educational/entertainment/cultural	95	150
Political	35	70
Shared mail	60	NA
Other local	65	110
Mass Merchandisers		
National Chains	155	90
Discount chains	140	45
Supermarkets	80	50
Other mass merchandisers	95	50

Table B.3

DISTRIBUTION OF CONSUMER AD MAIL COSTS
BY CATEGORY OF ADVERTISER

	Jan. 1986		
	Direct Estimate	1982 CPM + 15%	Oct. 1982
Nationwide Direct Mail (Net)	48.5%	41.4%	33.4%
Publishers	28.1	23.9	13.7
Non-Profit	5.7	2.8	4.8
Insurance/financial	5.7	3.0	3.9
Coupons	5.5	7.9	6.5
Miscellaneous industries	2.0	2.2	2.3
All other national	1.6	1.6	2.2
Mail Order Goods (Net)	26.9	34.0	27.8
Multi gifts/gadgets	8.0	9.9	10.8
Single category catalogs	13.9	21.1	11.4
Single items/ general merchandise	5.0	3.0	5.6
Local (Net)	13.9	18.4	25.8
Total Stores (Sub-Net)	5.9	9.9	14.5
Department stores	1.6	3.6	10.2
Other stores	4.3	6.3	4.3
Shoppers	1.7	1.2	1.5
Services	2.6	0.9	1.5
Educational/entertainment/ cultural	1.4	2.5	4.7
Political	0.2	0.5	1.0*
Shared mail	1.2	2.3	NA
Other local	1.0	1.0	2.7
Mass Merchandisers (Net)	10.7	6.2	13.0
National Chains	2.9	2.0	6.2
Discount chains	3.4	1.3	2.5
Supermarkets	1.2	0.9	2.8
Other mass merchandisers	3.2	2.0	1.5

* This estimate excludes the candidate mail. Non-candidate political mail was 1.7% of the ad mail in October 1982.